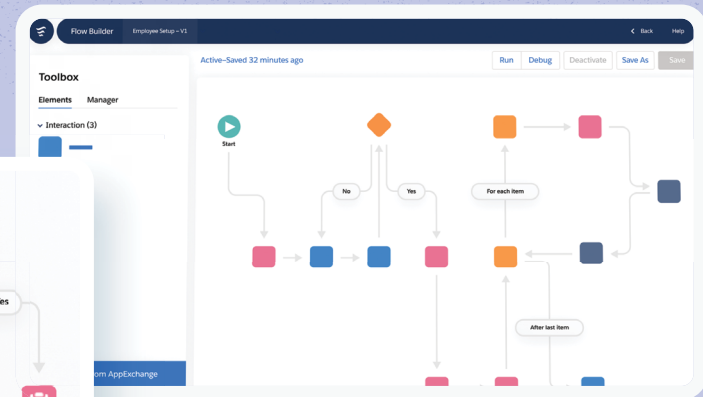
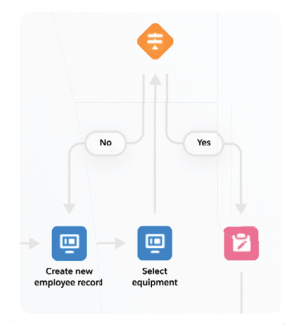


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Thanks!



Contents

Introduction 03

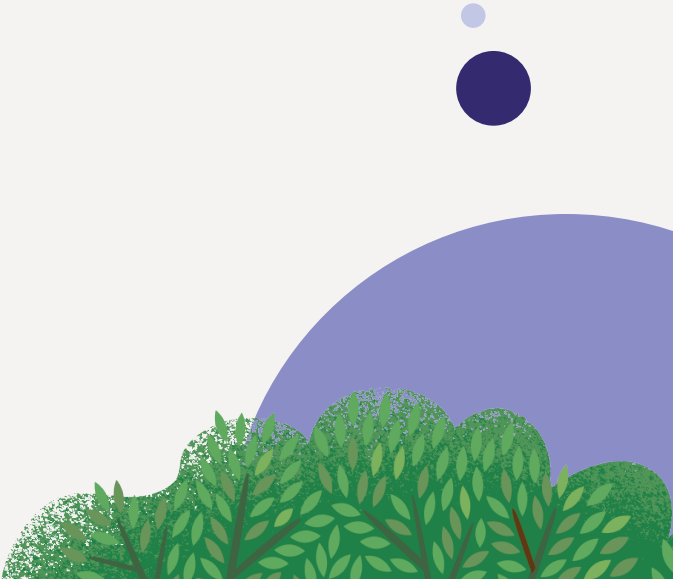
01 | Employees Are Stretched as Customer Expectations Rise..... 04

02 | Automation Becomes an IT Imperative 07

03 | Customer Service Processes Evolve as Demand Surges..... 11

04 | Sales Automation Goes Mainstream..... 16

Data Sources and Research Methodology..... 20



Introduction

In a rapidly changing world, customer expectations for innovation and connected engagement continue to rise, increasing pressure on employees who were already stretched thin. To meet the needs of all stakeholders, many businesses are kicking off workflow automation initiatives or accelerating those that were already in process.

This report covers the impact of workflow automation on various aspects of employee and customer engagement, including:

- How automation impacts one of the hottest topics in business and IT strategy – employee experience (EX)
- How IT and customer-facing teams are partnering to bring their processes into a new era
- The impact of automation on sales and customer service teams

SEE PAGE 20 FOR
DATA SOURCES AND
METHODOLOGY.



01

Employees Are Stretched as Customer Expectations Rise

The year 2020 rapidly sped up digital transformation.

Digitization had already been on the roadmap for many businesses. However, the pandemic and its aftereffects created new urgency to adapt – nearly overnight – to a new set of customer needs and habits, accelerating what may have otherwise been a more incremental process.

With restrictions on physical interaction and sudden upheaval to customers' lifestyles and businesses, the call for digital change has been loud. Business executives have taken note.

47% of executives say COVID-19 made them fundamentally rethink the customer experience (CX).¹

Customer Demand for Digital Experiences Increases Amid Pandemic

Consumers and Business Buyers Who Say the Following²

I expect companies to accelerate digital initiatives due to COVID-19

87%

COVID-19 has elevated my expectations of companies' digital capabilities

67%

The way I engage with companies has transformed since the beginning of 2020

55%

01

Employees Are Stretched as Customer Expectations Rise

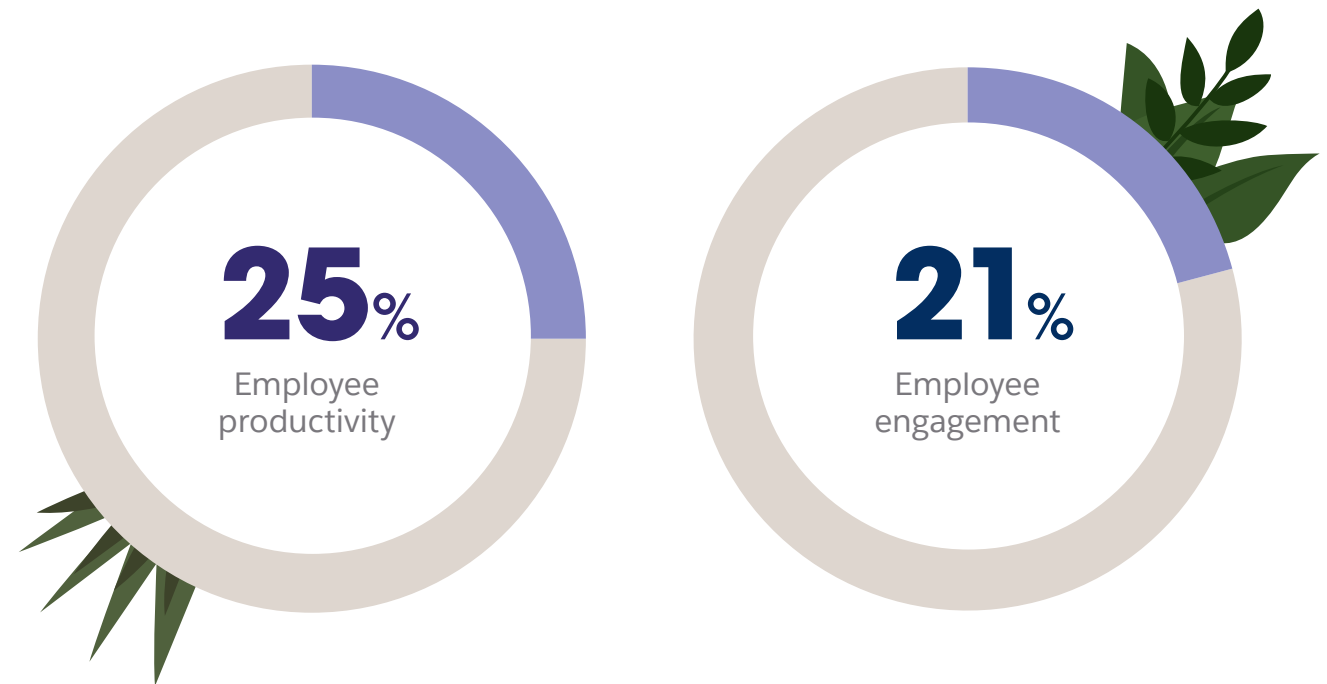
Rising customer demands have reached employees already contending with new work environments and personal stressors. For many, work days are longer than they used to be.

35% of employees working remotely since the pandemic report working later than usual.³

Many IT leaders suggest that employees have not been fully equipped for the challenges ahead. Even with EX among IT's top priorities, most IT leaders agree that their technology does not maximize employee productivity or engagement.

Employees Are Stretched and Under-Resourced

IT Leaders Who Say Their Technology Maximizes the Following⁴



IT Leaders' Top 5 Priorities⁴

- 1 Customer experience
- 2 Security and trust
- 3 System integration
- 4 Employee experience
- 5 Mobile technology



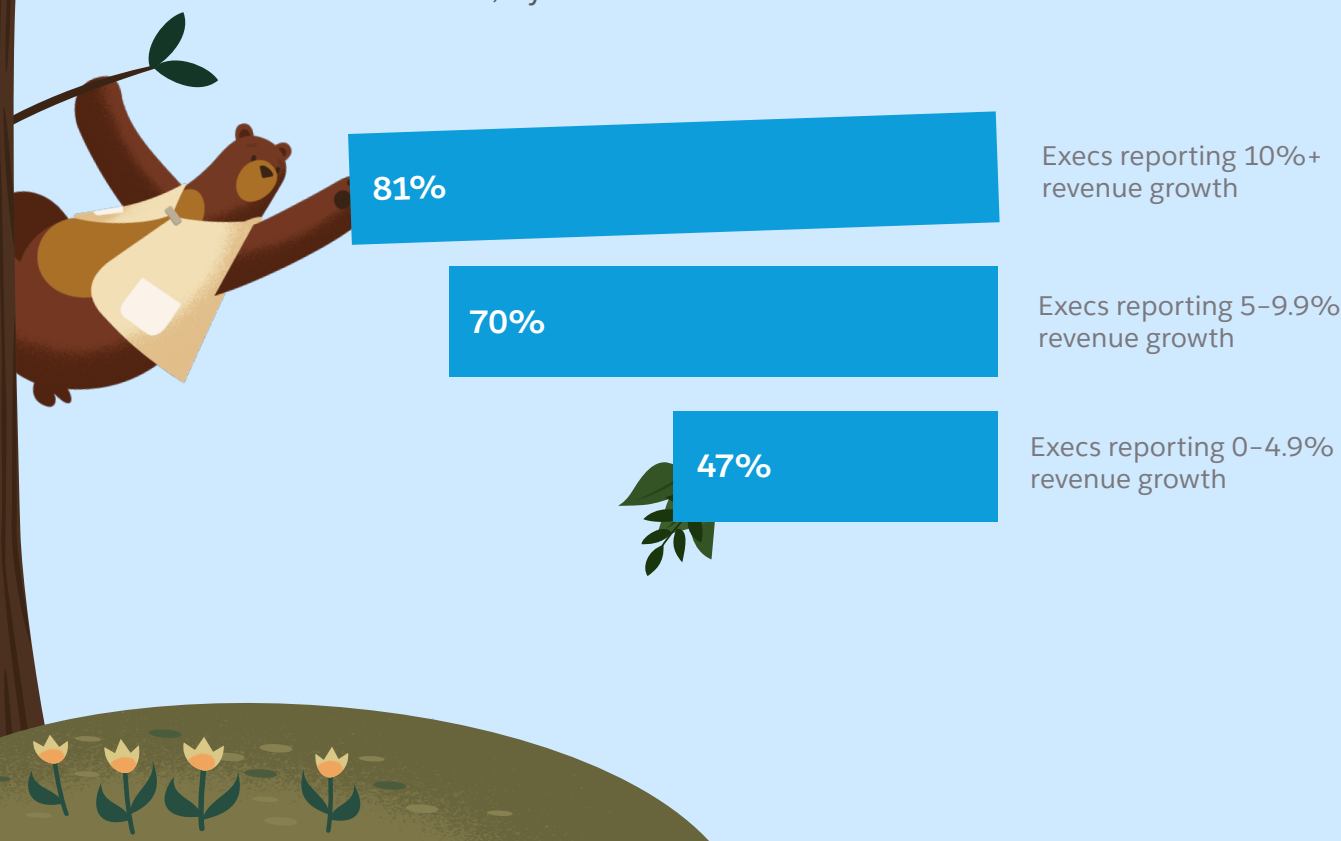
Spotlight: The Relationship Between EX, CX, and Revenue

Research suggests prioritizing EX may yield revenue benefits.¹ We have long known about the link between CX and revenue. However, according to business executives, EX may also be a revenue multiplier by raising revenue both indirectly (by improving CX) and directly.

There is a direction to the relationship between EX and CX. According to executives, improved EX leads to improved CX. However, there is no “virtuous” cycle: Most executives do not think investing in CX inherently improves EX. This supports the idea that a happy employee base leads to greater customer satisfaction.

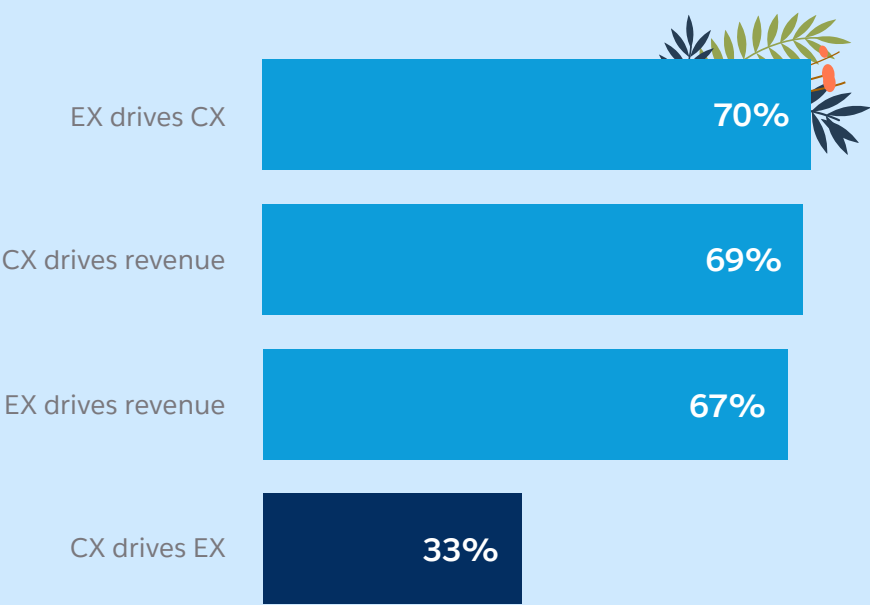
Prioritizing EX Correlates with Revenue Growth

Executives Who Say EX Is a Top 5 Objective over the Next Three Years, by YoY Revenue Growth¹



The Path from EX to CX to Revenue Is One Way

Executives Who Agree with the Following¹



02 Automation Becomes an IT Imperative

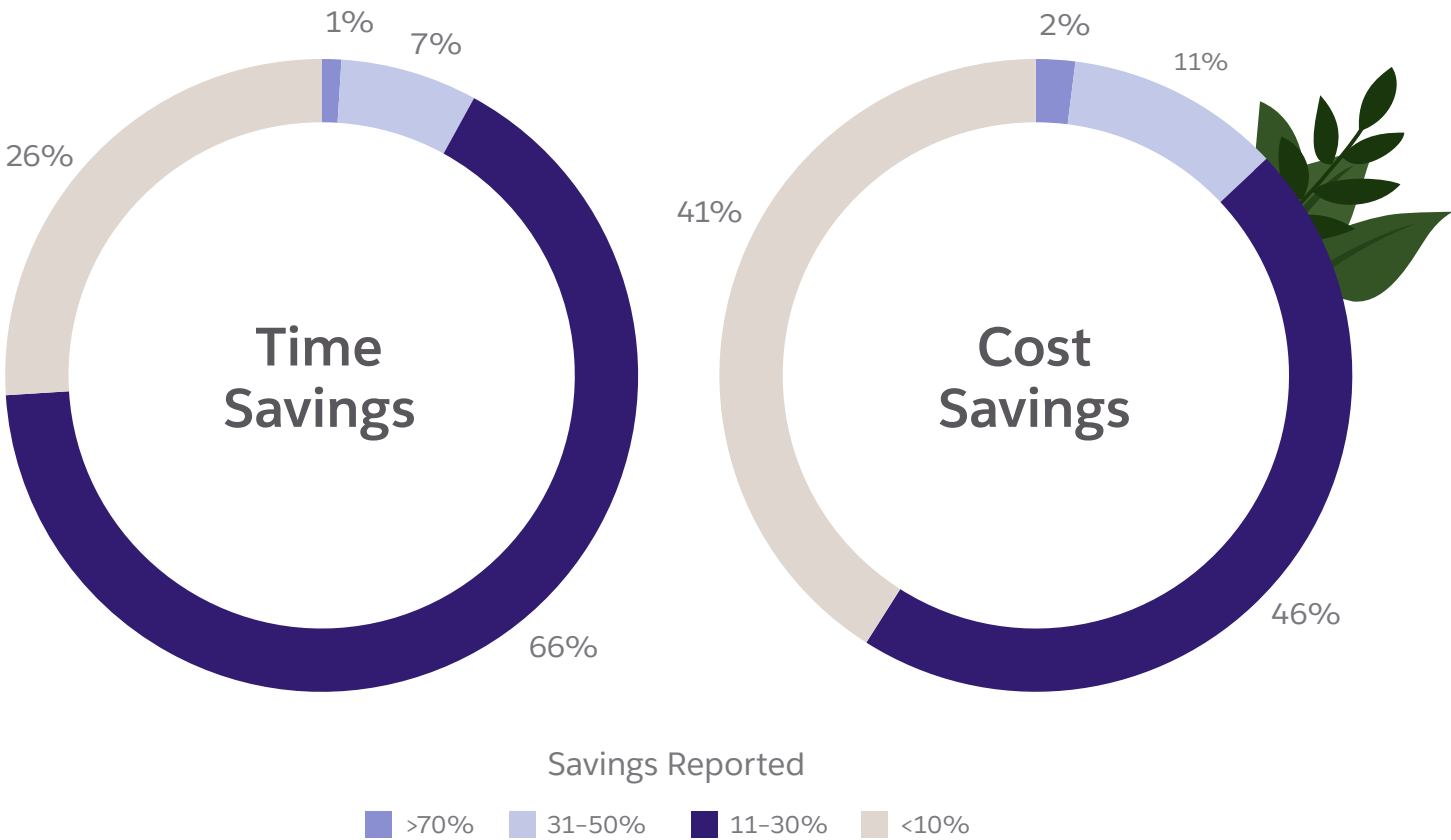
With employees across the business asked to do more with less, technical leadership has set its sights on process automation.

95% of IT and engineering leaders say their organizations are prioritizing workflow automation.⁵

Technical leaders who have implemented automation report strong ROI. In fact, nearly 75% see time savings equivalent to at least four hours per 40-hour week. As manual tasks shift from human to machine, employees have more time for strategic work.

Automation Cuts Costs and Time

IT and Engineering Leaders Who Report Savings from Process Automation⁵



Assessment is of departments that have prioritized automating manual processes.





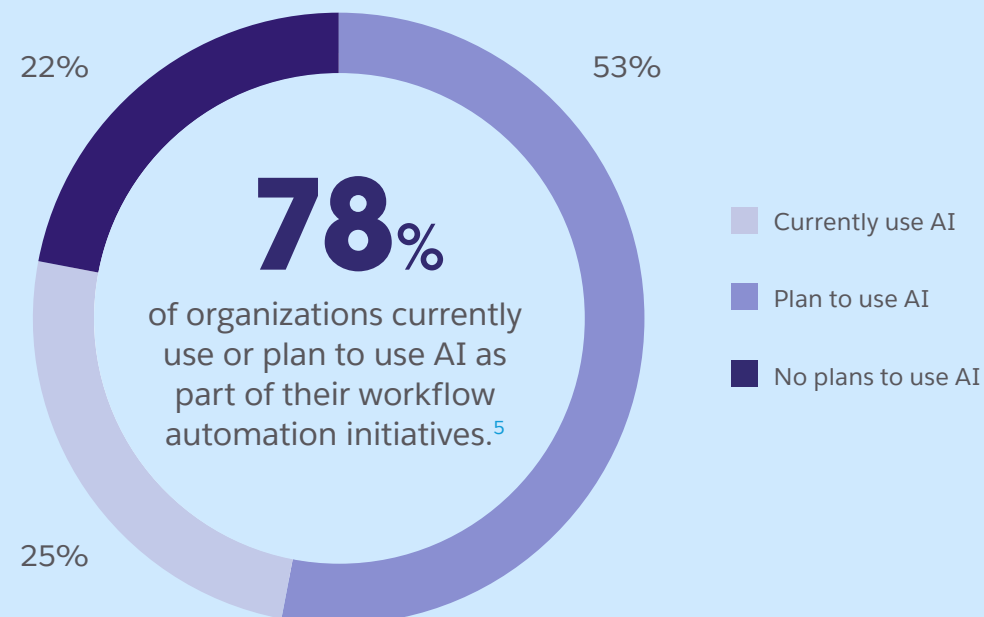
Spotlight: Automation and Artificial Intelligence

Artificial intelligence (AI) is a building block for many of the more sophisticated automation technologies, but can pose challenges to IT teams looking to implement it. While less than a third of IT teams have incorporated AI into their automation initiatives so far, many teams plan to.

“ Rules-based processes are still of paramount importance in the new world of automation. However, AI augments workflows with the ability to understand language, predict behavior, or make recommendations.”

- MARCO CASALAINA
SVP PRODUCT MANAGEMENT, EINSTEIN
SALESFORCE

IT Plans to Nearly Triple the Use of AI in Workflow Automation Initiatives



Base: IT and engineering leaders.

IT Leaders' Top Challenges for AI Implementation⁴

- 1 Insufficient technical skills
- 2 Competing priorities



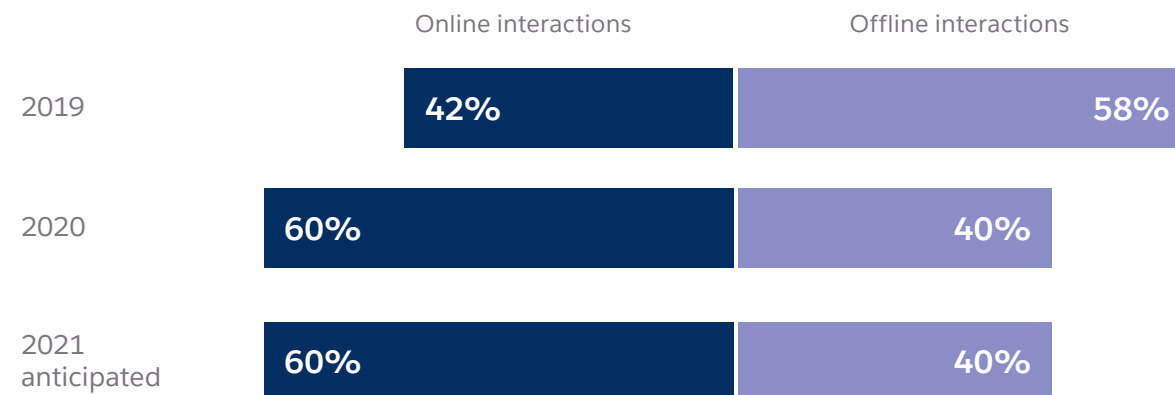
02 Automation Becomes an IT Imperative

IT has no lack of projects to work on these days. Like their peers in other business units, they've been hit hard by accelerating demands. In addition to a growing base of remote employees, customers are spending more time online than before – increasing the importance of digital. Across the globe, demand for digital projects is on the rise, and many IT teams are overwhelmed.

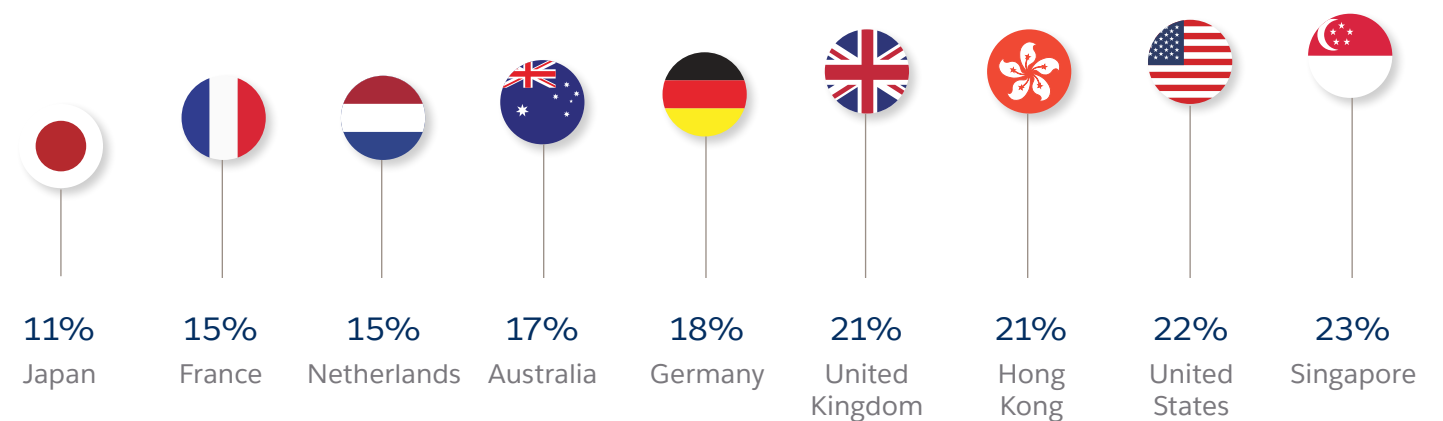
37% of line of business (LOB) employees are fully confident IT has the skills and technology to keep up with demands.⁶

IT Workloads Are on the Rise in an Increasingly Digital World

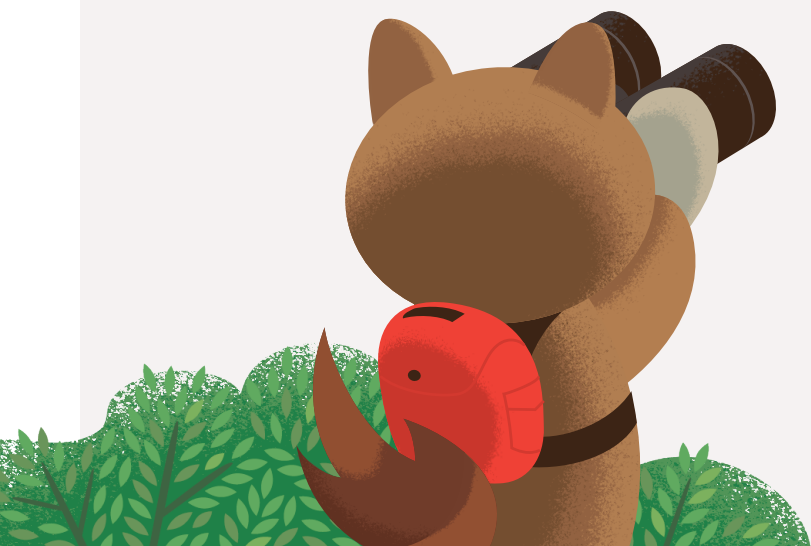
Customers' Estimated Split of Online and Offline Interactions with Companies²



Reported Percentage Increase in IT's Digital Projects Due to COVID-19⁶



Base: Line of business employees.



02 Automation Becomes an IT Imperative

LOB employees have noticed that IT is swamped: A majority say leaders are too focused on day-to-day work to attend to forward-thinking projects.

Reflecting their eagerness to accelerate progress, over two-thirds of LOB employees are interested in partnering with IT on digital innovation. This group of employees may find promise in low-code application platforms (LCAPs) – a quickly advancing set of tools for that job.

LCAPs are a tool that less technical teams can use to build apps without much coding. According to Gartner: “By 2023, over 50% of medium to large enterprises will have adopted an LCAP as one of their strategic application platforms.”⁷

Lines of Business Seek IT Project Acceleration

LOB Employees Who Agree with the Following⁶

I want access to data and IT capabilities to be productive as digital projects increase



82%

IT and LOB employees should jointly drive digital innovation



68%

IT leaders are preoccupied with keeping the lights on



58%



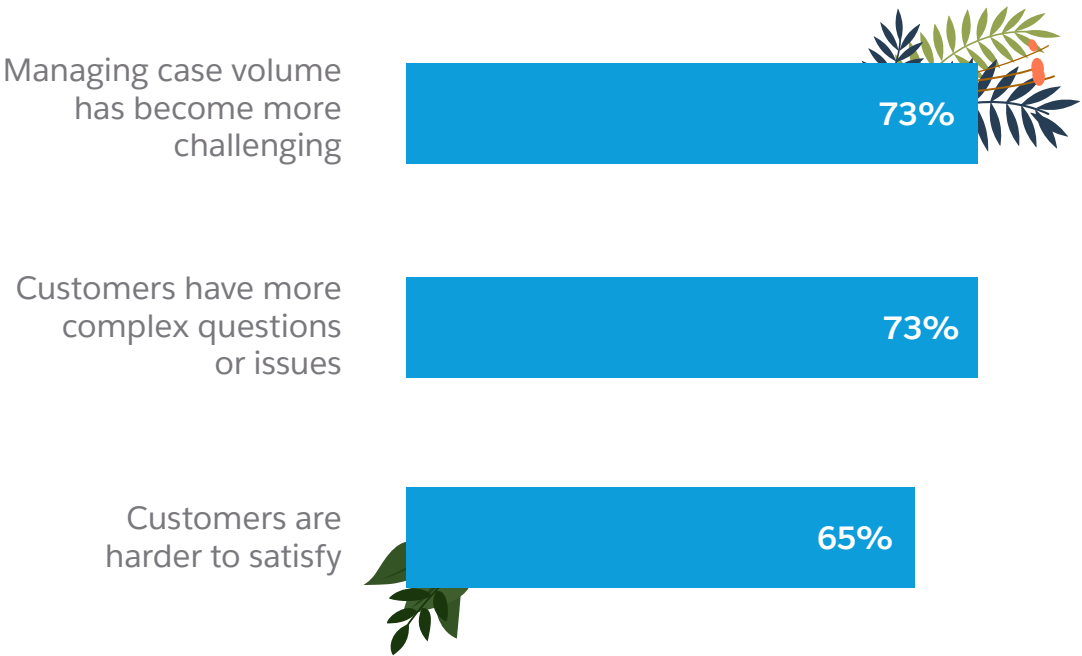
03 Customer Service Processes Evolve as Demand Surges

As companies reinvent how they engage customers, service agents – at the forefront of customer relationships – are particularly under mounting pressure. Cases are more numerous and challenging than ever, yet only a minority of service teams have received budget or headcount increases in the wake of the dueling health and economic crises.

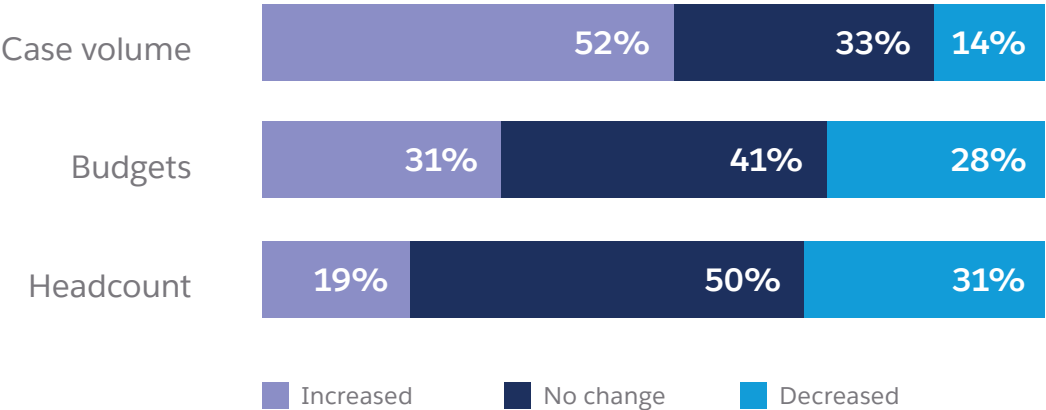
57% of customers say COVID-19 has raised their standards for customer service.²

Agent Workloads Increase While Resources Remain Stagnant

Service Professionals Who Agree with the Following⁸



Changes to the Following at Service Organizations During 2020⁸



03 Customer Service Processes Evolve as Demand Surges

Customer service teams are looking to automation for relief from escalating workloads.

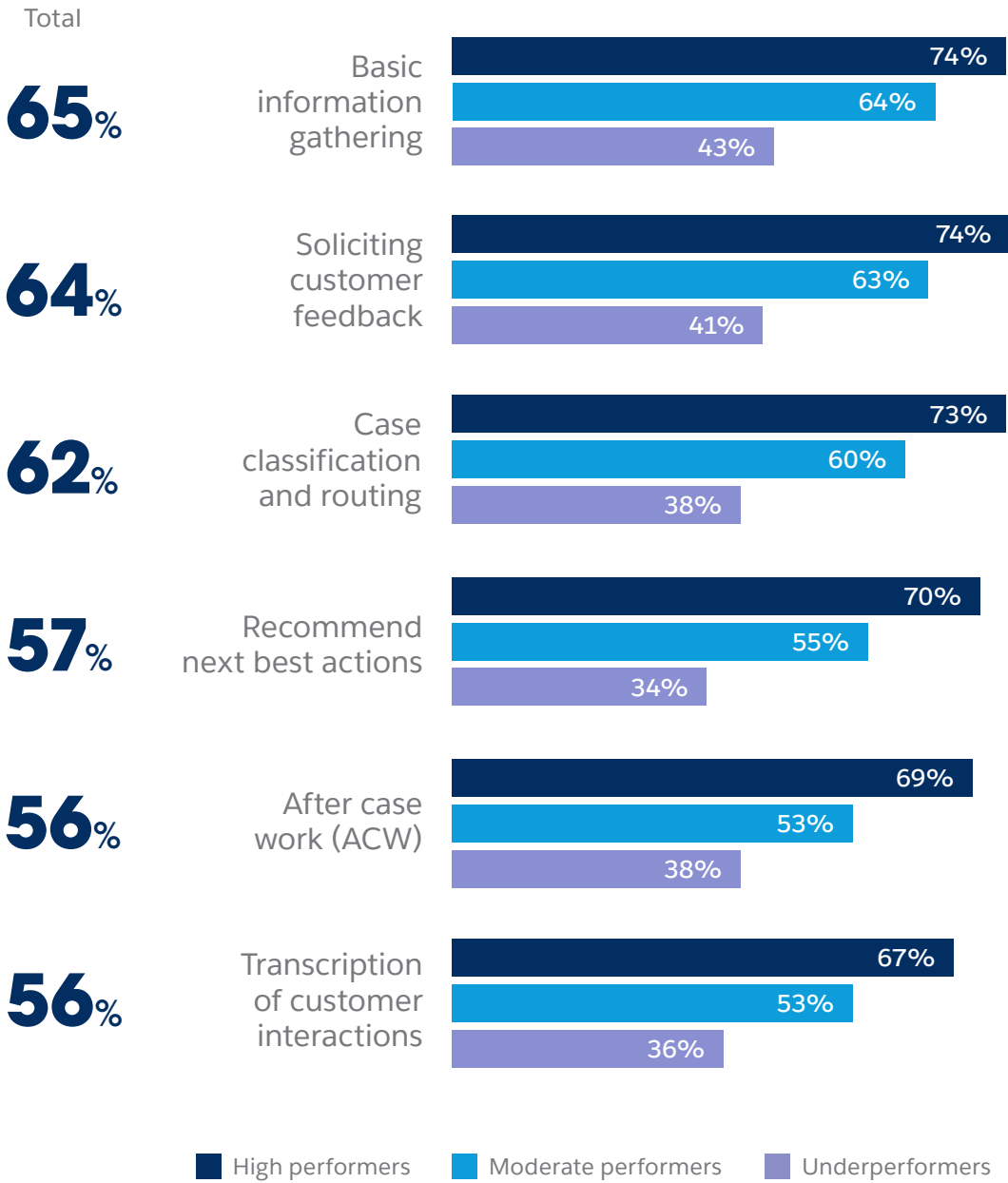
Time-consuming manual processes, like collecting background information and conducting after case work, can frustrate both the customer and the employee.

Today, a majority of service professionals say repetitive tasks like these are mostly automated at their organizations, with high-performing service teams – those reporting the highest customer satisfaction – leading the charge.

71% of service decision makers say they’re accelerating automation initiatives.⁸

High Performers Turn to Process Automation

Service Professionals Who Say the Following Are Mostly Automated at Their Company⁸



Answers include “mostly” or “completely” automated (versus mostly or “completely” manual). High performers rate their customer satisfaction as “excellent,” moderate performers as “good,” and underperformers as “fair” or “poor.”

03

Customer Service Processes Evolve as Demand Surges

One well-known example of automation in customer service – chatbots – has seen notably quick adoption in recent years.

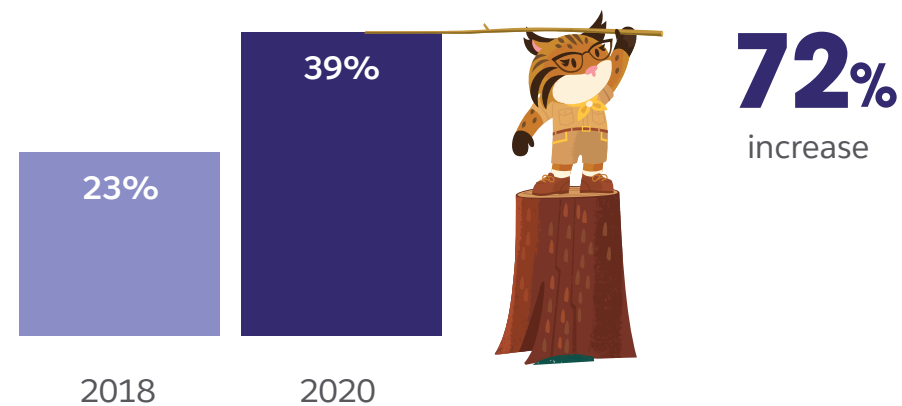
“ Chatbots can field repetitive tasks, like routing cases to the right agent and answering simple questions. Done right, they free employees to focus on more creative, valuable work, while giving customers fast responses even when case volumes are high.”

- BRIAN SOLIS
GLOBAL INNOVATION EVANGELIST
SALESFORCE

83% of customers expect to engage with someone immediately when contacting a company – up from 78% in 2019.²

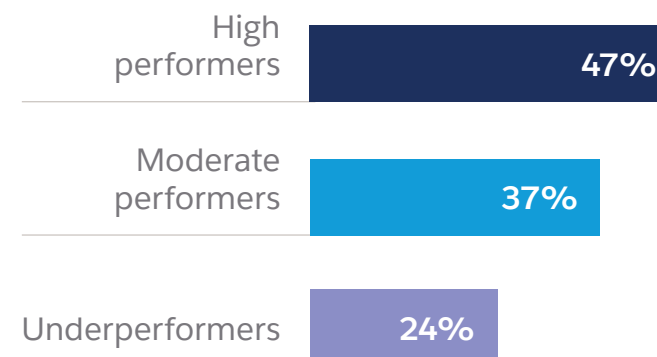
Service Organizations Increasingly Turn to Chatbots

Service Decision Makers Who Say Their Organization Uses Chatbots⁸



Year-over-year growth rate is calculated with the formula (new value - old value)/old value.

Chatbot Adoption by Service Organization Performance Level⁸



Base: Service decision makers.
High performers rate their customer satisfaction as “excellent,” moderate performers as “good,” and underperformers as “fair” or “poor.”

03 Customer Service Processes Evolve as Demand Surges

Not all service automation is based on AI, but more sophisticated technologies – such as some chatbots – rely on it.

AI has become a powerful aid in customer service, working behind the scenes to raise insights and recommendations, populate data, and trigger processes.

While fewer than half of service teams currently use it, AI use is growing. A majority of service decision makers say they have a fully defined AI plan.



AI Takes Off in Service

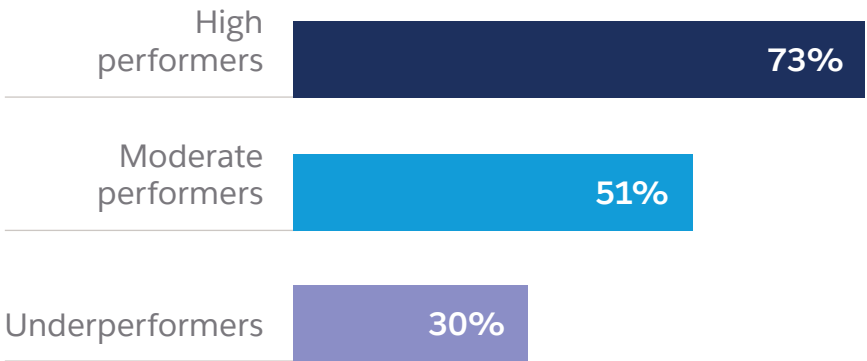
Service Decision Makers Who Say Their Organizations Use AI



Year-over-year growth rate is calculated with the formula (new value - old value)/old value.



Service Decision Makers Who Say They Have a Fully Defined AI Strategy⁸



High performers rate their customer satisfaction as “excellent,” moderate performers as “good,” and underperformers as “fair” or “poor.”



Industry Lens: Service Automation Trends

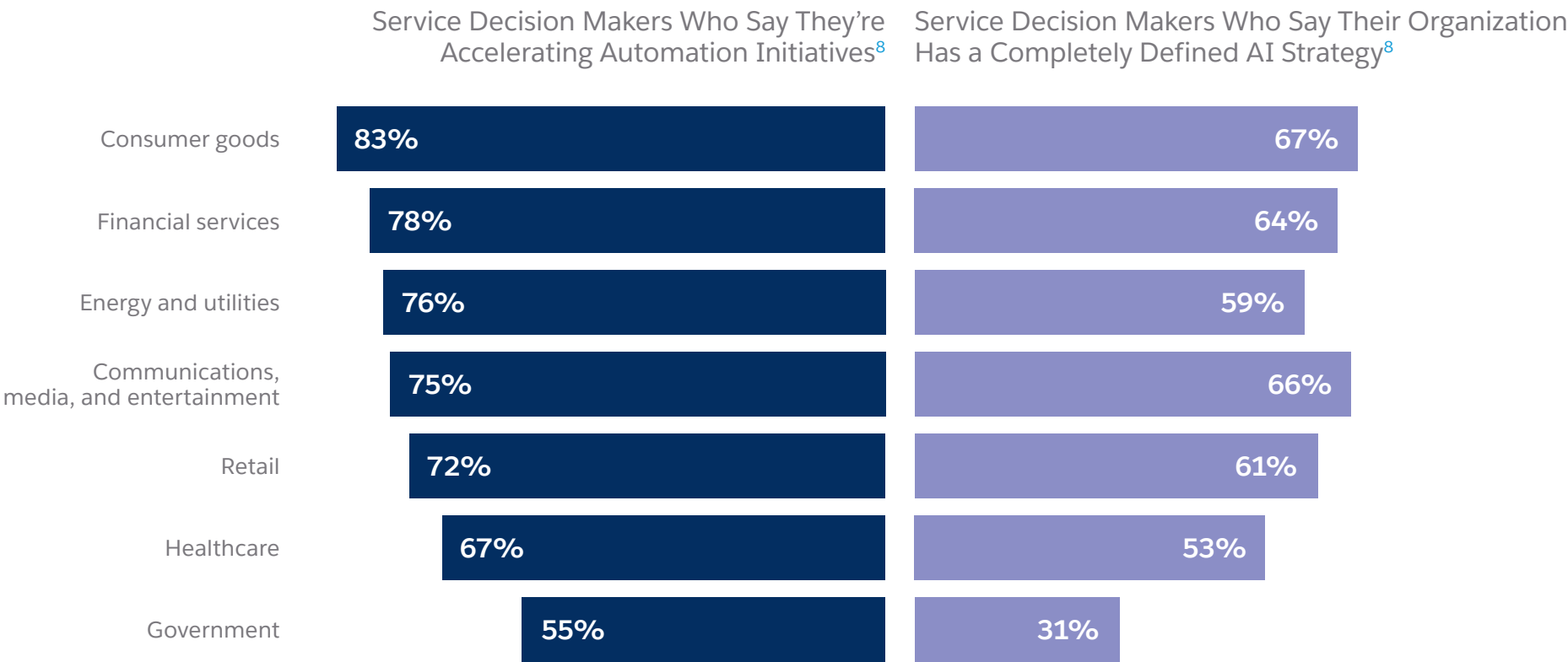
Most industries feel a push to automate their customer service processes, but some are moving faster than others.

For instance, a whopping eight in 10 service decision makers in consumer goods say they’re accelerating automation initiatives.

Planning for artificial intelligence, however, lags slightly behind, with smaller numbers saying their AI strategy is fully defined.

Government agencies – often subject to strict budgets and regulatory controls – are moving slower on AI and automation than many industries.

Consumer Goods Is at the Forefront of Service Automation and AI While Government Lags



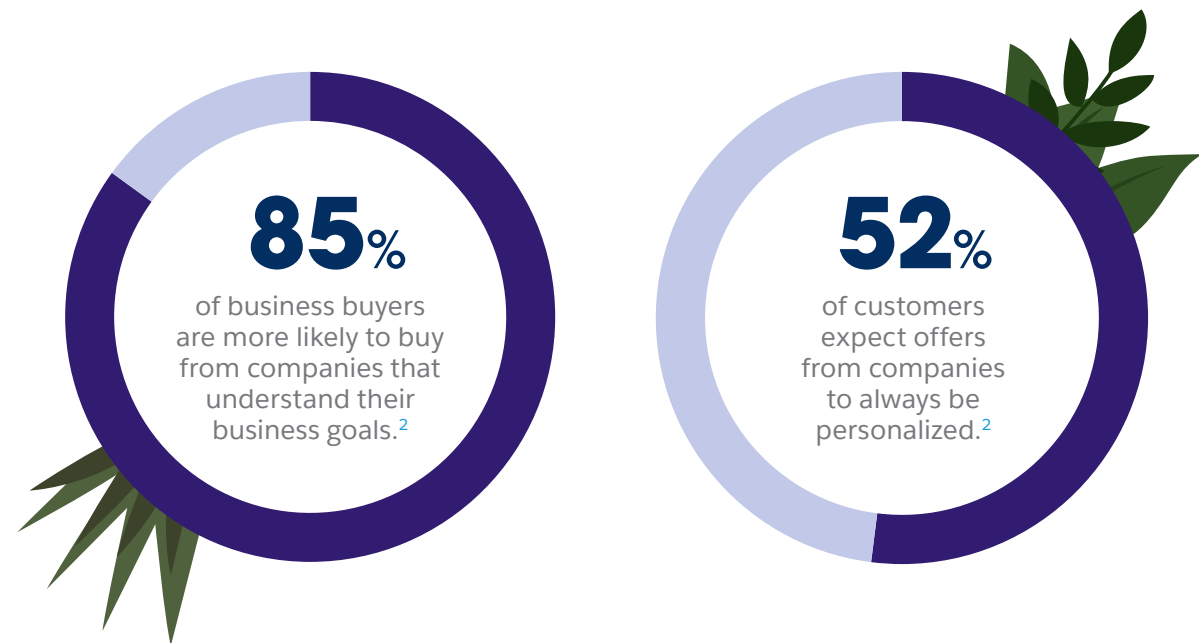
04

Sales Automation Goes Mainstream

The value of a good salesperson, as a knowledgeable and empathetic advisor, only grows during times of ambiguity and change. Personalization is paramount as customers spurn generic pitches and instead award business to those who understand their unique needs and provide value.

However, developing the background to customize a pitch takes time, and many sales reps say they're too bogged down with other responsibilities to gather the insights they need.

Sales Reps Struggle with Increasing Customer Demands



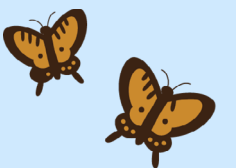
The Sales Insight Gap



90% of sales reps say current economic conditions make it important to anticipate customers' needs.¹⁰

77%

of sales reps say it's challenging finding time to get the customer insights they need.¹⁰



04

Sales Automation Goes Mainstream

According to sales leaders, AI – an important building block for many automation technologies – helps reps better address customer needs.

AI has been rapidly growing its sales footprint. While the technology has other use cases in sales, like improving forecast accuracy, leaders say AI's most significant impact ties directly back to the customer relationship, where it helps sales reps spend more time with the customer and better understand their needs.

“We already have great relationships with our customers, and AI became the catalyst for deeper connections with them.”

- FELISA PALAGI
CEO
INTERNET CREATIONS

AI Use Grows in Sales

Sales Leaders Reporting AI Use



Year-over-year growth rate is calculated with the formula (new value - old value)/old value.

Top 3 Impacts of AI on Sales Teams¹⁰

- 1 Understanding of customer needs
- 2 Use of sales reps' time
- 3 Understanding of competition

Base: Sales leaders at organizations using AI. Ranked by percentage who say improvements have been “major.”

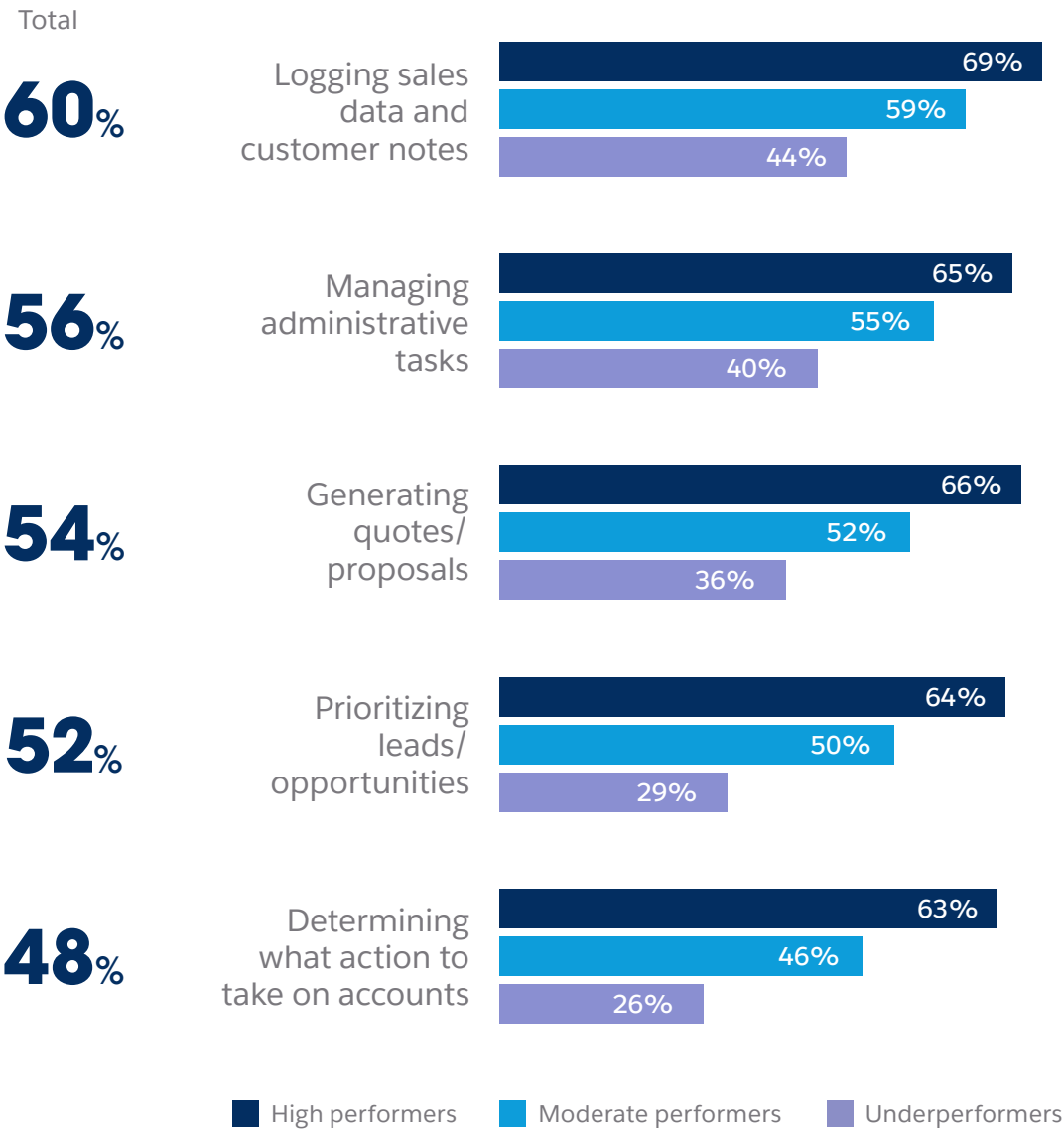
04 Sales Automation Goes Mainstream

When customers feel understood and personally attended to, they're more likely to buy. Perhaps unsurprisingly, data shows top sales organizations are more likely to automate repetitive manual tasks, freeing up reps' time for meaningful customer interaction.

Transcription of sales data and notes is the most common way sales teams automate. However, high sales performers are particularly differentiated by automating recommendations for actions to take on accounts.

High Performers Turn to Process Automation

Sales Professionals Who Say the Following Is Mostly Automated at Their Company⁸



High performers are “completely” confident in their organization’s ability to close deals. Moderate performers are “mostly” or “moderately” confident. Underperformers are “slightly” confident or “not confident.”



Industry Lens: Sales Automation Trends

Industries vary in terms of which aspects of the sales process they seek to automate. However, logging sales data and customer notes is a leading target for automation.

Unsurprisingly, some industries show higher adoption numbers for sales automation than others. While the

energy/utilities and retail sectors take the lead, even the less automated industries – like communications, media, and entertainment – show strong numbers. This suggests sales automation is not a niche consideration for specific industries so much as a general trend taking place across sales overall.

Sales Professionals Who Say the Following Is Mostly Automated at Their Company¹⁰

	Logging sales data and customer notes	Generating quotes/proposals	Managing administrative costs	Prioritizing leads/opportunities	Determining what action to take on accounts
Energy and utilities	67%	63%	60%	59%	58%
Retail	66%	62%	61%	61%	60%
Healthcare	63%	60%	58%	51%	47%
Financial services	61%	57%	56%	49%	50%
Consumer goods	61%	52%	59%	53%	48%
Communications, media, and entertainment	54%	49%	44%	50%	39%

Not all industries included in the survey are shown here.



Data Sources and Research Methodology

All data is based on double-blind surveys of third-party panel respondents. All data cited in this report includes global respondents, except for The Experience Equation, which is U.S. only.

Detailed respondent demographics, segmentation definitions, and methodology information can be found in the sources listed below.

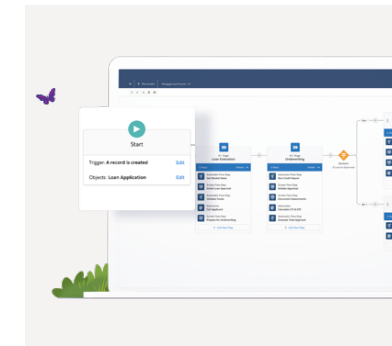
Data from a survey may not have been published in the report cited.

We standardized countries across the most recent State of Sales, State of the Connected Customer, and State of Service surveys. As a result, numbers published here may differ from those in the original reports.

Sources

- 1 The Experience Equation survey, Salesforce & Forbes Insights, November 2020.
- 2 State of the Connected Customer survey, Salesforce, July-August 2020.
- 3 Snapshot Research Series, Salesforce, May 2020.
- 4 Enterprise Technology Trends, Salesforce, May 2019.
- 5 Workflow Process Automation survey, Salesforce, March 2021.
- 6 The State of Business and IT Innovation, MuleSoft, December 2020.
- 7 Magic Quadrant for Enterprise Low-Code Application Platforms, Paul Vincent et al., 30 September 2020.
- 8 State of Service survey, Salesforce, August-September 2020.
- 9 State of Service, Salesforce, March 2019.
- 10 State of Sales survey, Salesforce, May-June 2020.
- 11 State of Sales, Salesforce, May 2018.

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